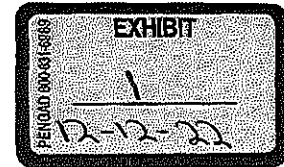


## PERFORMANCE IMPROVEMENT PLAN

To: Tatiana Sherman, Workforce Project Manager  
From: Joe Lowder, Dean of Economic and Community Services  
Date: March 8th, 2019



This memorandum is intended as a good faith effort to inform you of deficiencies in your work performance and to institute measures that will bring your performance back in line with expectations.

### I. Position Description

- a. **Duty or Responsibility:** Project Management – expected to write, manage, monitor and closeout projects with high degree of accountability. Order books, supplies, or equipment as needed for training classes. Ensure training project files and records are accurate and meet all guidelines for yearly audits. Assist team members with the same as needed.

i. **Task:** Preparing quotes for companies for workforce training

**Deficiency:** Quotes not worked on collaboratively, shared in a timely manner, not always accurate or detailed.

**Corrective Action:** quotes should be reviewed by director and given to director in timely manner for proper review before company. Project manager should pull all past quotes/invoices for company and then compare to new prices. The final price quoted to company will be determined by director and/or dean and project manager collaboratively taking into account the new updated prices, past price history for company and quantity of training requested. As discussed in person, quotes should be thorough. Anyone in company or school should be able to read the quote and understand the full scope of project. To accomplish all of this, it must be explained to company that it could take a few days. A reasonable timeline is expected to accomplish getting the quote correct.

ii. **Task:** Managing of projects

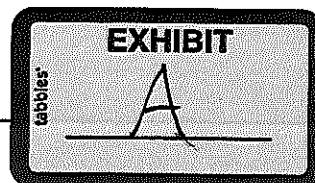
**Deficiency:** Proper tracking of documentation and lateness of checks to companies

**Corrective Action:** Project manager should be pro-active in all things and track emails, quotes, invoices, checks and communication with company representatives. A folder for each company should be created in outlook email. All communication with company representatives should be kept there. A file for each company should be created on the x: drive and any documentation (quote, invoice, please pay, etc) should be kept there for at least 5 years. Also track company interactions and visits in outlook. Also track surveys and job placements for student pathways.

Project manager should be pro-active in managing the timeline of check reimbursement. Project manager should keep a timeline of when paperwork is received, number and type of classes, approximate amount and record all data. Project manager should set a reminder in outlook calendar about each batch of company paperwork.

- At 60 day mark, project manager should look into reimbursement paperwork and work collaboratively with accountability and financial specialist to prioritize paperwork and try to cut a check within 30 days to company.
- If there is some issue why that can't happen, please involve director and/or Dean so we can proactively work together to solve resolution and collaboratively draft a response to the company about the delay and work on getting check cut in a timely manner.

Lastly, Project manager should order books and supplies for in-house and adjunct trainers. Project manager should provide complete documentation for each class that they ask trainers to teach for company or individuals prior to class.



ICC Sherman  
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- b. **Duty or Responsibility:** Communication/Teamwork: Assist team members with ensuring all files and records are accurate and meet all guidelines for yearly audits. Work and communicate effectively with the Accountability and Data Specialist and Financial Specialist to ensure all project documentation is accurate. Work with division team members to facilitate continued growth of the workforce and MEP program. Daily use of proficient oral and written communication skills.

i. **Task:** Clear and effective communication with team

**Deficiency:** Often relies on email when a conversation could be more clear and effective.

**Corrective Action:** Any major changes should be communicated in person and then followed up by email to document changes, such as with entrepreneurship program stated in evaluation. Those kind of changes should be shared and discussed with supervisors before sharing with external entities.

Quotes should be worked on collaboratively with Director as stated above.

Work within team to solve problems, not just via email or on your own. Most of these problems are complex with multiple moving parts where paperwork might be on someone else's desk. It can be much easier to go into a colleague's office or huddle everyone up to solve a problem. Email should be used to summarize and clarify and document when needed.

Please work closely with accountability team and director. Help them input classes and participants into pro-assessment or be willing to do anything as needed to move the project along. Help them total classes and correct for errors while they are doing it, especially if we are beyond 90 days on a reimbursement. Do not wait for someone to complete a task before you are part of the process.

Please attend all assigned committees, division and college events, and any event assigned as other duties.

## II. Personal Characteristics

i. **Task:** Feedback

**Deficiency:** You have not been receptive to feedback

**Corrective Action:** Feedback given is for employee growth and to help the department move forward more effectively. It is not meant as a personal attack, but often is received that way. Also please do not deflect blame onto other people. If issues or deficiencies arise with a team member, inform the Director at that time. Try to think of ways you can help move the issue forward in a positive direction.

ii. **Task:** Take direction from Director/Dean

**Deficiency:** Often questions directives from Dean/Director and does not accept direction without a prolonged push-back in different forms.

**Corrective Action:** It is ok to question, that is needed in a healthy work environment and Ms. Sherman has made some good points, but there is a limit to the push back that can result in delays and breakdowns between team members and external partners. Director/Dean are sometimes at meetings or in conversations that you are not. Under no circumstance should an external partner be called to counter the directive given as stated example in evaluation. Under no circumstance should employee go to other employees or into their files to try find information that would invalidate supervisor's directive.

iii. **Task:** Teamwork

**Deficiency:** Would often prefer not to collaborate whether with staff or departments.

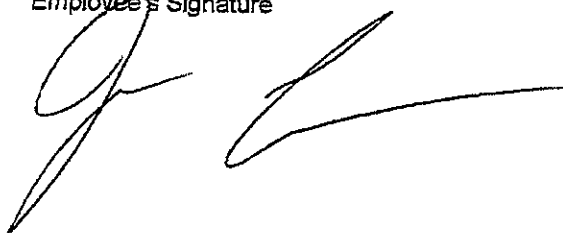
**Corrective Action:** It is important we all move ICC forward. Structures are changing but we often had to discuss which department would get credit for a project. There seems to be competition between other staff and departments,

which is not always healthy for our division. We all need to work together. When I recently asked Ms. Sherman to help the accountability team, she checked on them, but then got paperwork to review later on her own. The team would have appreciated her being a part of that solution when they were working on it.

Your satisfactory work performance in all areas of your position is critical to the department. Your immediate and sustained improvement on the above expectations is required. Your performance will be monitored over the next 6 months and we will evaluate your progress towards the corrective action measures listed above on or around August 31<sup>st</sup>, 2019.

My signature below acknowledges the following:-I received a copy of this Performance Improvement Plan (PIP), it was discussed in detail with me, a copy will be placed in my employee file and failure to make satisfactory progress towards the corrective action measures stated above may result if further disciplinary measures to include termination.

ICC Sherman  
Employee's Signature



March 8, 2019  
Date

3-8-19

W: T- Luter 3/8/2019